

CM-ECF Quick Reference Filing Guide

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U.S. Bankruptcy Court

Western District of New York



CM-ECF Quick Reference Filing Guide

revised 11/2003

How to Use This Quick Reference Guide:

- Click on items in 'contents' (to the left of the page)
- **For best results:** Use the index or search tabs (to the left of the page)

What is Displayed on Each Page:

- CM/ECF menu / link selections - the progression of CM/ECF menu choices you must make to perform the desired task
- Procedures, Notes, and Tips - the local procedural requirements applicable to each task

Need Help?

- In Buffalo, call 716-551-4130
- In Rochester, call 585-613-4200
- email webmaster@nywb.uscourts.gov
- A printer-friendly version of this manual is available here, however this online manual is always to be considered the correct and current version. Because changes are made to this manual frequently, please be sure your printed copy is the correct version. (The current version date is located at the bottom of each page)

Case_Opening_-_Schedules_-_Related_Activities

File a Ballot

CM/ECF menu / link selections:

Bankruptcy > Other > Chapter 11 Ballots

Procedures, Notes and Tips:

Last Updated:

December 1, 2003

A printable .pdf version of this entire guide is available.

File a Chapter 11 Case

CM/ECF menu / link selections:

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

* Use this only if you not using case preparation software capable of uploading your files into ECF (ie. Best Case or Blankrupter)

- **Office:** 1 (Buffalo) or 2 (Rochester)
- **Role type:** Debtor in Possession (For individual Joint filing, second party entered is "Joint DIP.")
- Be sure to add alias information and any party text
- Be sure to complete statistical reporting screen
- **Assets notice designation:** Choose y (yes)
- For receipt number Leave blank and use the pay module for payment
- [Go to Bankruptcy>Other>Voluntary Petition - Chapter 11 to file petition.](#)

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December 1, 2003

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File a Chapter 11 Final Report

CM/ECF menu / link selections:

Bankruptcy > Other > Chapter 11 Final Report & Account

Procedures, Notes and Tips:

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File a Chapter 12 Case - (without using case preparation software)

CM/ECF menu / link selections

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

*** Use this only if you not using case preparation software capable of uploading your files into ECF (ie. Best Case or Blankrupter)**

- **Office:** 1 (Buffalo) or 2 (Rochester)
- **Role Type:** First party entered is "Debtor," second party entered is "Joint Debtor."
- Be sure to add alias information and party text
- Be sure to complete statistical reporting screen
- Asset notice designation: Choose y (yes)
- For receipt number Leave blank and use the pay module for payment
- Go to [Bankruptcy>Other>Voluntary Petition - Chapter 12](#) to file petition.

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File a Chapter 12 Plan

CM/ECF menu / link selections:

Bankruptcy > Plan > Chapter 12 Plan

Procedures, Notes and Tips:

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File a Chapter 13 Amended Plan - Post-Confirmation

CM/ECF menu / link selections:

Bankruptcy > Motion/Applications > Modify Plan

Procedures, Notes and Tips:

- Attach amended Plan

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December 1, 2003

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File a Chapter 13 Amended Plan - Pre-Confirmation

CM/ECF menu / link selections:

Bankruptcy > Plan > Amended Chapter 13 Plan

Procedures, Notes and Tips:

- Refer to Plan
- Attach Amendment Cover Sheet if Plan is amended pre-confirmation.

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December 1, 2003

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File a Chapter 13 Case

CM/ECF menu / link selections:

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

* Use this only if you not using case preparation software capable of uploading your files into ECF (ie. Best Case or Blankrupter)

- Office: 1 (Buffalo) or 2 (Rochester)
- Role Type: First party entered is "Debtor," second party entered is "Joint Debtor."
- Be sure to add alias information and party text
- Be sure to complete statistical reporting screen
- Asset notice designation: Choose y (yes)
- For receipt number, leave blank and use the pay module for payment
- Go to Bankruptcy>Other>Voluntary Petition - Chapter 13 to file petition.

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File a Chapter 13 Plan

CM/ECF menu / link selections:

Bankruptcy > Plan > Chapter 13 Plan

Procedures, Notes and Tips:

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File a Chapter 7 BK Case

CM/ECF menu / link selections:

Bankruptcy > Open BK Case

Procedures, Notes and Tips:

* Use this only if you not using case preparation software capable of uploading your files into ECF

- Office: 1(Buffalo) or 2(Rochester)
- Role Type: First party entered is “Debtor,” second party entered is “Joint Debtor.”
- Be sure to add alias information and party text
- Be sure to complete statistical reporting screen
- Asset notice designation: Choose N (no)
- For receipt number Leave blank and use the pay module for payment
- **Next: Go to Bankruptcy>Other>Voluntary Petition-Chapter 7** to file petition

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File a Creditor's Request for Notice (filed by a creditor)

CM/ECF menu / link selections:

Bankruptcy > Other > Creditor's Request for Notice

Procedures, Notes and Tips:

- This event adds a creditor to the mailing matrix only for purposes of future mailings
- Select party from list or Add/create new party with Role Type of Creditor
- Add creditor (See Add Creditor Instructions)

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File a Disclosure Statement

CM/ECF menu / link selections:

Bankruptcy > Plan > Disclosure Statement

Procedures, Notes and Tips:

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File a Notice of Appearance and Request for Notice - (filed by an attorney representing a party to add a part to a case)

CM/ECF menu / link selections:

Bankruptcy > Other > Notice of Appearance and Request for Notice

Procedures, Notes and Tips:

- Select party from list or Add/create new party with Role Type of Creditor
- Add party

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File a Plan

CM/ECF menu / link selection:

Bankruptcy > Plan >Chapter 11 Plan

Procedures, Notes and Tips:

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File a Reaffirmation Agreement

CM/ECF menu / link selections:

Bankruptcy > Other > Reaffirmation Agreement

Procedures, Notes and Tips:

- Select party from list or Add/create new party
- Enter creditor in text box

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File a Voluntary Chapter 11 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 11

Procedures, Notes and Tips:

- The petition must be filed after opening a BK case, if you are not using “one-touch” upload software (ie. Best Case or Blankrupter)

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File a Voluntary Chapter 12 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 12

Procedures, Notes and Tips:

- The petition must be filed after opening a BK case, if you are not using "one-touch" upload software (ie. Best Case or Blankrupter)

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File a Voluntary Chapter 13 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 13

Procedures, Notes and Tips:

* The petition must be filed after opening a BK case, if you are not using “one-touch” upload software (ie. Best Case or Blankrupter)

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File a Voluntary Chapter 7 Petition

CM/ECF menu / link selections:

Bankruptcy >Other >Voluntary Petition 7

Procedures, Notes and Tips:

* The petition must be filed after opening a BK case, if you are not using “one-touch” upload software (ie. Best Case or Blankrupter)

- Attach a petition and creditor matrix as a PDF
- Upload the creditors through upload creditors (Creditor Maintenance).

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File Amended Schedules (where a filing fee is required)

CM/ECF menu / link selections:

Bankruptcy > Other > Amendment(Fee)

Procedures, Notes and Tips:

- Indicate in text box reason why Petition is being amended
- Pay filing fee (credit card)
- If adding creditors, see Upload Creditors
- Attach Cover Sheet
- Attach Certificate of Service

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File Amended Schedules (with no filing fee required)

CM/ECF menu / link selections:

Bankruptcy > Other > Amendment (No Fee Due)

Procedures, Notes and Tips:

- Indicate in text box reason why Petition is being amended
- Attach Cover Sheet
- Attach Certificate of Service

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File an Affidavit Regarding an Application to Employ

CM/ECF menu / link selections:

Bankruptcy > Other > Affidavit

Procedures, Notes and Tips:

- Refer to Application (found under motion)
- Enter name in first text box (e.g., “Bill Jones”)
- Enter title of related Application in second text box (e.g., “Application to Employ”)

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File an Amended Disclosure Statement

CM/ECF menu / link selections:

Bankruptcy > Plan > Amended Disclosure Statement

Procedures, Notes and Tips:

- Refer to Disclosure Statement
- Use prefix to describe; i.e. first, second

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File an Amended or Supplemental Matrix

CM/ECF menu / link selections:

Bankruptcy > Other > Amended (Fee)

Procedures, Notes and Tips:

- Matrix must be in PDF format
- Pay filing fee (credit card)
- add new creditors to case; see upload creditor section
- Attach Cover Sheet

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File an Amended Petition

CM/ECF menu / link selections:

Bankruptcy > Other > Amendment (No Fee Due)

Procedures, Notes and Tips:

- Indicate in text box reason why Petition is being amended
- Attach Cover Sheet
- Attach Certificate of Service

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File an Amended Plan

CM/ECF menu / link selections:

Bankruptcy > Plan > Amended Chapter 11 Plan

Procedures, Notes and Tips:

- Refer to Plan
- Use prefix to describe; i.e. first, second

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File an Application for Compensation by Attorney for Debtor

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications> Compensation

Procedures, Notes and Tips:

- Check Attorney for Debtor as filer
- Enter type as Debtor's Attorney
- Enter dates from when, to when
- Enter fees requested and expenses requested (e.g., "2000.00 and 125.00")
- Skip second applicant if present on screen

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File an Application for Final Decree

CM/ECF menu / links selections:

Bankruptcy > Motions/Applications> Final Decree

Procedures, Notes and Tips:

- Clerk's office will enter Final Decree and close case if no objections are filed

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File an Application to Employ Attorney for Debtor

CM/ECF menu / link selections:

Bankruptcy > Motions/Applications> Employ

Procedures, Notes and Tips:

- Select Debtor as filer
- Enter name of person to be employed when prompted (e.g. "Bill Jones")
- Enter type of position when prompted (e.g., "Attorney for Debtor")

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File Schedules and Statement of Affairs

CM/ECF menu / link selections:

Bankruptcy > Other > select appropriate documents such as Schedules A-J; Statement of Affairs; Statement of Intent

Procedures, Notes and Tips:

- To select multiple documents, press and hold the CTRL key on your keyboard and single-click (with your mouse) on the documents you wish to select
- Do not use when filing an amendment to documents already filed..use amendment, instead
- Attach Schedule/Amendment Cover Sheet
- Attach Certificate of Mailing

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Upload Creditors

CM/ECF menu / link selections:

Bankruptcy > Creditor Maintenance > Upload a Creditor Matrix File

or if you need to upload individual creditors:

Bankruptcy > Creditor Maintenance > Enter Individual Creditors

Procedures, Notes and Tips:

- Creditor Matrix must be in .txt format. Use this when filing without the use of bankruptcy preparation software (ie. Best Case or Blankrupter)
- Enter Individual Creditors, as needed

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View an Operating Report

CM/ECF menu / link selections:

Bankruptcy > Other > Operating Report

Procedures, Notes and Tips:

- Enter filing period (e.g., "October 1, 2001 to October 30, 2001")

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